

Date: April 5, 2019

To: Dr. Lowder

CC: Mr. Senter

Re: Response to Performance Evaluation

From: Tatiana Sherman

This document is to serve as a formal response for my performance evaluation issued by Dr. Lowder on March 8, 2019.

I have been employed at Itawamba Community college since August 2003 and served in different roles as needed. Over the years, my knowledge and experience has only continued to grow as I concentrated on my job as a workforce project manager. I am requesting an objective evaluation of my work by providing a factual basis for the overall recommendation and ratings below. The purpose of this response is to present fair and documented facts. Dr. Lowder has been serving as a Dean of Economic and Community Services since the summer of 2016. Until now, I have not received a job evaluation from my Dean. Based upon inconsistent and low ratings in this evaluation, I have concerns that this evaluation was prepared for reasons other than providing objective feedback. If so, I want this response to provide documentation of my objections to the evaluation. If I have misunderstood and the evaluation is indeed for objective feedback, then I hope my written response will assist in our communication to help me meet or exceed expectations moving forward.

My goal is to remain a loyal employee of ICC and continue to improve and increase my work performance. I do welcome feedback, but want it to be factual, fair and objective. Listed below are the objectives and performance on which I have been evaluated with responses.

RATING CATEGORIES:

- 4 - Exceeds Expectations (performance that consistently goes beyond meeting goals)
- 3 - Fully Meets Expectations (commendable performance that meets goals)
- 2 - Partially Meets Expectations (inconsistent aspects of performance requiring improvement to meet some goals)
- 1 - Does Not Meet Expectations (goals unmet, skills not demonstrated, improvement needed)

WORK QUALITY

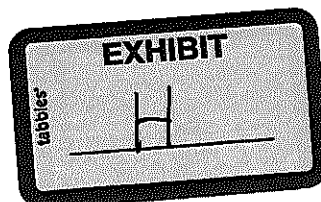
Work products are professional, clear and comprehensive in keeping with department standards.

SELECT RATING - 1

My score is rated at a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

Here is an objective listing of information about my work products:

1. Project management.



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I have written and managed approximately 40 workforce projects a year (data from FY'18), including Toyota and Toyota suppliers, furniture, energy and other companies and agencies in the five county ICC district.

In FY'19, I have 29 current company-based workforce projects in the ICC district (this number represents company-based workforce projects only). This represents 54% all company-based workforce projects for the team.

2. During multiple years in my 15-year tenure, I have successfully managed million-dollar budgets with no discrepancies in the annual audits.

During my 15-year experience in the current role, I have never had fiscal findings resulting from annual workforce audits performed by the State Board for Community Colleges and never been requested to provide additional documentation/information to auditors in support of my files.

While, it is typical from year to year for one of the project managers to be requested by auditors to provide additional information, I have never had to do so. Based on the FY'17 audit, two other project managers were asked to provide additional documentation.

3. I have always prepared all documentation for the audit in a timely manner.

All documentation has been on file for all projects and verified before each audit. While other project managers have had to reproduce documents in response to an audit, my work performance and preparation have never necessitated that I had to recreate documentation.

4. I have met all deadlines for state project submissions, modifications and budget close-outs at the end of the year.

5. I have met all deadlines for Mississippi Extension Partnership (MEP) report submission (monthly and quarterly) since I assumed this additional role in September 2018.

6. In addition to my workforce project management duties I have also managed business projects along with public classes such as Computer classes for Houston, Pontotoc, Amory and Lee county WIN Centers throughout the college district.

7. I provided leadership for the business marketing and promotions by performing the following actions to ensure success of the initiatives:

Worked closely with Community Relations Department at ICC to develop marketing tools including: flyers and press releases for WIN Job Center classes in Houston and Pontotoc, and TV interviews for Construction to Employment Pathway in FY'18.

In addition, I scheduled and coordinated workforce classes and programs including creating/designing new pathways such as Construction and Entrepreneurship and Small Business Management

8. I work with our internal Proassessment data system and external Workforce Enhancement Funds Sub-grant System database on a daily basis.

Example: In FY'18, I managed \$1,523,036 in workforce projects which is 58% of the total budget in company projects for the whole team. ICC receives 6 per cent in revenue back to the college. This year ICC received around \$65, 000 based on the amount from the last year. This is money earned to the college as a direct benefit of the amount of the work I performed.

9. Based on the data for FY'18 and FY'19, I continue to be the top producer on the workforce team. My productivity can be evaluated based on the following numbers:

I have scheduled /coordinated 1,105.5 hours of ICC training/services, which is the base for collecting \$79,085.05 in billing for ICC training/services.

There are three main producers on the team: two project managers and Continuing Education Department. The data below represents numbers for two project managers only. Based on the billing loss /profit report for project managers, my productivity level is at 86 % of the total training hours for WD&T department. See the chart below for details.

Producers	People in Classes	Percentage
Total for Project Managers	693	100%
Tatiana	462	66%

Producers	Training Hours	Percentage
Total for Project Managers	1,272.50	100%
Tatiana	1,105.5	86%

Please refer to the Total number of Hours and People Report for FY'19 in the attachment.

The chart below represents FY'19 only for the workforce team.

Total Billing/Net information for FY'19	Total	\$ 103,133.05	100%
	Tatiana	\$ 79,085.05	76%

Please refer for details for the billing report for FY'19 in the attachment.

10. I also create quotes for upcoming projects and billing statements.

I create from 2-5 quotes monthly. The minimum number of quotes for me is 24 quotes a year or more.

11. I perform other duties such as crafting proposals for all levels of classes and programs (leadership, safety, ISO adults).

Example: working with instructors on meeting companies' needs, arranging conference calls, company visits and collaboration.

12. My experience and knowledge of policies for workforce training includes developing budgets for workforce classes and pathways.

As an example, the budget for the program includes: marketing cost, training material cost, reimbursement from state sub-grant system and student tuition. This requires tracking, monitoring, billing and diligently staying on top of each project to avoid errors.

13. Part of my performance involves marketing ICC services, working with Community Relations on marketing programs, creating flyers, press releases for all WIN Job Centre computer classes and Construction and Entrepreneurship pathways. Marketing also included TV ads and community engagements, E-Media marketing and outreach campaigns, fliers for different college related events, social media, etc.

14. I was able to raise over \$250,000 for the last 7-9 years for the benefit of the ICC Foundation as a result of my calling on potential contributors. This was not part of my job description but, was a voluntary contribution of my time and influence to benefit the college. To my knowledge no other individual employee has ever raised money at this level.

15. Part of my work performance has dealt with organizations such as firefighters and law enforcement agencies by offering state certifications for correction officers and incident command certifications to firefighters.

16. Through my efforts we started serving as a pilot for nationally recognized certifications such as NCCER Construction Core certification, Microsoft Office Certifications and Entrepreneurship and Small Business management Certifications.

As an example, I have marketed the construction core class in collaboration with two NCCER trainers (Stacy Stepp and Karey McAnally), visited local construction companies and recruited potential students. Three companies committed to interviewing and hiring successful completers from the program: Century Construction, FL Crane & Sons and JESCO. These three companies provided lunches for the participants, and served as guest speakers during every class. The number of students competing the program in FY'18 was 50. One company supported the program by enrolling their staff in this pathway to further develop their careers.

17. I have provided interpretation services for one of our international customers in Mississippi, Syntron, by working with their international clients to assist in developing a major overseas relationship.

18. As a team member for business prospects (Toyota and Toyota Suppliers) I have contributed to this service by creating budgets with Federal and State sub-grant reimbursements and providing education about college courses and programs.

19. I work with companies by marketing assessment programs for industrial maintenance skilled workers with whom I have workforce projects. This role included scheduling written and hands-on assessment for the following companies in 2018-2019, including Mueller Copper Tube, Oil Dri and others.

20. I have been a decades-long volunteer for Regional Rehabilitation Center.

21. I have demonstrated proficiency in Excel and Word.

22. I have a proven performance record in customer development.

23. I have demonstrated performance in business analysis.

I do not understand the basis for my rating on work quality and request clarification. The team has not been presented with performance standards. Under Dr. Lowder's administration, the team did not meet on a regular basis (not monthly nor quarterly) since the fall 2016-fall to 2019. I am requesting a list of standards for my professional improvement. The only bad example Dr. Lowder used during our meeting was two quotes in the last 2-3 years -see my comments on page 16 under Quotes.

PRODUCTIVITY:

Produces targeted outcomes and results efficiently and effectively.

SELECT RATING - 2

My score is 2 which indicates that I demonstrate inconsistent aspects of performance requiring improvements to meet some goals.

Based on the last 2-3 years, my work and targeted accomplishments were included in the monthly and annual President's Reports presented by the Dean.

The following information was presented to the College Board for the FY'18-FY'19 President's Report. See quotes from the report below:

"Workforce Pathways:

1. NCCER Construction Core:

Three classes were conducted with 18 students completed and 16 obtained NCCER Construction Core certification.

Entrepreneurship and Small Business (ESB) Management is a new career program launched in September, 2018. Seven enrolled and completed the program.

2. Workforce Development & Training Program Overview – FY18
Over \$2.6 million Workforce Enhancement Training Funds "

Out of \$ 2.6 million I managed \$1,523,036 in FY'18, which 58% of the total amount in Workforce and public classes for the college. Refer to attached Project Year 2018 Performance Data.

My company visits are presented on monthly reports.

I make from 7-12 company visits monthly. I made 120 visits in FY'18.

Based on the time frame and data collected for the last President's Report, I generated 70 plus % for ICC from billing based on the scheduled hours of college sponsored training hours/consulting and assessment.

The following are the numbers from the President's Report that I contributed towards as a team member:

1,815 FY workforce classes, an increase of 44% over last year
345 college-delivered classes
1470 college-supported classes
76 individual business projects written, an increase of 36% over last year
18 Maintenance Assessments performed
Scheduled and coordinated assessments for 7 companies collecting \$10,700 in profit for assessment fees
22,844 FY18 trainees being served (duplicated head count)
12,225 FY 18 workforce trainees (unduplicated head count)
166 companies served through all projects (last report 166)

Based on the information from 2018-2019 from the ICC internal data system, I have been a top producer in the department. I have been a top producer while simultaneously successfully serving other roles and responsibilities (see responses for work quality above). I do not understand the basis for this rating.

CUSTOMER FOCUS (Students and Companies):

Establishes and maintains good working relationships with customers, by understanding and responding promptly to customer needs and expectations.

SELECT RATING - 2

My score is 2 which indicates that I demonstrate inconsistent aspects of performance requiring improvements to meet some goals.

As the top producer on the team, my production reflects good working relationships with customers. I consistently manage more than half of the workforce training volume in our department, approximately 35-40 projects annually.

I am using a MEP survey report for FY'18 in order to provide evidence of ICC project management satisfaction. Based on the MEP reports for the last two years and going 10 years back, ICC has been ranked at 95 % satisfaction as net promoter. I contribute to this satisfaction rate as a project manager who strives for customer satisfaction daily. ICC satisfaction rate is 15 percent higher than overall in the state between 5 training centers, and ICC is the only MEP Center in the state with 100 % survey response rate. I manage 58 % of workforce investment training funds through ICC workforce projects. I also write and manage 40 projects annually.

Based on the survey, companies reported the following benefits from the MEP Program for which I, as a team member, provide the administrative function (included in president report for FY'18-19).

- \$475,371 investment in plant equipment
- \$69,000 investment in information systems
- \$2,537,405 investment in workforce practices
- \$2,975,925 in cost savings/avoid unnecessary investments
- \$ 9,180,000 in increase in sales
- \$ 1,255,000 in retained sales
- 234 manufacturing jobs were created

FUNCTIONAL/TECHNICAL KNOWLEDGE:

Demonstrates expertise in the functional aspects of the job and follows guidelines and procedures.

SELECT RATING - 2

My score is 2 which indicates that I demonstrate inconsistent aspects of performance requiring improvements to meet some goals.

My 15-year record shows that I follow guidelines explicitly. My dean referred to me in one of the meetings as "too much by the book", yet the rating of "2" in this category indicates the complete opposite. I have performed clean audits since I have taken this job. I have worked on this job with four different project managers before Dean Lowder assumed his position. I was one out of the 4 who never had any fiscal findings on the job in the past 15 years. I am proud to say that I have always had a "clean" audit in the last 15 years working as a project manager at ICC. This demonstrates consistency and determination. In

the past, there were fiscal findings in the projects with 3 project managers. This has never been the case for me. In the last two years of state audits, I was the only project manager who did not have to provide any additional information about projects and accounting after the audit. I am also rated at "3" for proficient knowledge of state, federal and procedures pertinent for department, which indicates I know and demonstrate proficient understanding all state requirements for the job.

Proficient knowledge of state, federal policy and procedures pertinent for department.

SELECT RATING - 3

Understand workforce terminology and trends or seeks others advice and/or training to keep up to date.

SELECT RATING - 3

Both of these categories have a high rating. If I am proficient with state policy and procedures for the department, why is my rating "1" unsatisfactory with "work products and keeping them with department standards"? (See page 1). Also, I am rated "1" on "maintaining accurate and detailed class records, certifications and budget that will meet full audit compliance including grant, federal and state funds", but yet, I have "proficient knowledge of state policy and procedures for department".

COMMUNICATION (Written, Oral and Presentation):

Uses clear and appropriate language in writing and verbally in an appropriate manner in a variety of situations.

SELECT RATING - 1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I have never been informed about any case where I needed to clarify any information on my behalf either with a company or student. Per Dr. Lowder, "communication is very bad over all in the department".

If there is any misunderstanding, I will gladly work with team members on improvement. Dr. Lowder did not disclose what company claimed they did not receive clear communication from me. I have never been given an example prior to my evaluation regarding this complaint.

This rating is also inconsistent with the rating below for "Produces and delivers quality presentations to a variety of audiences where applicable", in which I was rated at "3".

I do not understand how my written, oral and presentation communication can be rated at "1" unsatisfactory, yet my presentation rating simultaneously "fully meets expectations" with a "3" rating.

Responds via phone/email to customers, students and co-workers in a timely and professional manner.

SELECT RATING - 1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I was not given any examples to support this low rating. I diligently return my phone calls and emails to customers and students in a prompt manner. My priority is customer service. If there was ever an issue, I was never informed about it by my Dean or other team members. I produce and manage 71% of training hours in the department. As recent as September 2018, the Dean assigned the full responsibility of the former MEP Director to me in addition to my existing responsibilities. I do not understand why or how I could assume a whole other position if there was an existing problem with me responding to customers, students and co-workers in a timely manner. By taking an extra responsibility, I added deadlines to my schedule on a monthly and quarterly basis. I have never failed those deadlines and plan to always keep very high accountability for all on-time reporting. I also manage 40 projects annually and enrolled students into two pathway programs. I stay very busy during my office hours. My work day starts with returning phone calls first. I always make customer service a priority and return all business correspondence next. I schedule assessments and communicate and return test results within 3 business days (I have emails to support this evidence) to business customers. I have documentation such as emails and assessment logs to back up the prompt time line for which I hold myself accountable with customers and students.

I do not understand the basis for this rating.

Produces and delivers quality formal presentations to a variety of audiences, where applicable.

SELECT RATING - 3

This is another example of inconsistency in this evaluation. This particular rating is at a 3. Yet in another rating category the evaluation indicates I do not demonstrate any skills for oral and written communication (see above under "Communication"). I submit this as an example of subjectivity when my rating also indicates I am proficient at delivering formal presentations. I do not understand how the same person can be rated so high and so low for the same set of skills. Presentations are more challenging to deliver. They require a concise and well-designed script that can be logically presented to a group of people. Based on this rating, I am proficient at this task, however, I do not meet expectations for oral or written communication skills. I do not understand the basis for my "communication" skills rating.

TEAMWORK/INTERPERSONAL RELATIONS/FLEXIBILITY:

Works collaboratively with fellow employees and colleagues to achieve identified goals and objectives for the department and college, including extra-curricular activities of the college such as graduation, benefit events (bluegrass), consortium events, etc.

SELECT RATING - 1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I served as a volunteer for the bluegrass concert until 2018. It was a 10-year contribution of my time during my working hours and after. I was the only member from the workforce team who personally invested in the Regional Rehabilitation Center. I took time off work in order to volunteer and prepare for a golf tournament to raise money for the center and Kentucky Derby. Kay Mathews, Regional Rehab Center director until 2016, and I worked on many projects together. This was my personal passion and I contributed time, effort and love to this wonderful organization. Raising money for this center was my passion. I did this because I believed in it with all my heart.

Since fall 2018, I am a Tupeio -Belden Faculty Association member.

I attend all consortium events.

Example of collaboration with the team and flexibility:

I rely on my team when I work on projects. I verify information with trainers and companies in order to make the best decision. I want to be as flexible as possible. I worked during Christmas break to assist the accountability team with data entry. I work with trainers' side by side in order to promote ICC services. Karey McAnally, ICC trainer, and I visited multiple company's together and marketed ICC programs. Stacy Stepp, ICC trainer, and I worked closely on student recruitment for Construction Pathway.

All student enrollments for the programs I promote was in collaboration with SNAP staff at ICC, WIOA and community contacts. I personally visited Counseling To Careers students and distributed flyers for ICC programs. I also visited Rehabilitation groups from Families First in order to market and promote classes. The Construction Pathway Program I launched in August 2018 generated the greatest number of students (52) than any other pathway program until today. This is all due to teamwork and team collaboration.

Example of doing extra on the job:

I launched two pathways during the last two years: Pathway to Employment in Construction and Entrepreneurship Small Business Management program. This was never an assignment by the dean or director. I also registered with Certiport (national certification center) as a test provider. I scheduled and administered tests myself, along with ICC IT assistance. Currently, we do not have another team member who has taken as many extra responsibilities on a voluntary basis on the workforce team.

As previously stated, I have voluntarily raised over \$250,000 for the ICC Foundation over the last 10 years, which is approximately 2-3 times more than all other staff volunteers combined.

I do not understand the basis for this rating.

Builds productive rapport with employees at all levels within and outside the department. Treats others with respect, dignity, and fosters the value of diversity and inclusion.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I will use my close peers as an example: I have been told by my peers that they appreciate working with me. One of the trainers always tells me how impressed he is with my determination and work ethic. He said, "I respect you for that". I work very well with our data entry person and new accountability specialist. They can vouch for me if needed.

I work very well with my peers in other departments including WIOA, SNAP, and other offices on the Tupelo and Fulton Campus.

I have not been given any specific examples of what constitutes the basis of this rating, so I do not understand how this rating was determined.

Adjusts performance to accommodate changes in departmental direction and processes.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I strive to accommodate departmental changes. The Dean shared his vision for the department to start developing pathways. In response to his vision, I am the only member on the team who has volunteered to find time and develop two new pathways at ICC: Construction Pathway and Entrepreneurship pathway. Ms. Waters did a great job on promoting and organizing the Manufacturing Skills Basic Certification program at ICC. This role was added to her job duties (job description) in the fall of 2016, and she also received a new title as a Lead Workforce trainer for accepting the challenge. I handle all levels of the two pathways myself, including writing the curriculum, marketing, enrollment, taking payments, getting industry participation and local partners involved and hiring instructors.

My development of Construction Pathway and Entrepreneurship Pathway was done voluntarily for the express purpose to contribute department goals and processes that Dr. Lowder envisioned.

Dr. Lowder also shared his desire for improved data entry processes including that project managers should "step up" and help team members with data entry. In response to his wishes, I came into the office during the college Christmas holiday and keyed in a month of classes and student data.

I do not understand the basis for this rating.

Active participation in assigned departmental meetings and committees, as well as college and division wide meetings and events.

SELECT RATING -2

My score is 2 which indicates that I demonstrate inconsistent aspects of performance requiring improvements to meet some goals.

I attend all departmental meetings.

Since the fall of 2018, I am a member of Tupelo-Belden College Faculty and Staff Association.

I attend CDF and Mississippi Economic Development programs and events as my schedule applicable.

I am currently on a Pathway Steering Committee

As a matter of record, the Dean prefers not to involve me in area or state meetings involving workforce. I receive information about changes and updates from the state level from casual conversations with other community college project managers.

I understand that stepping down from serving on a Navigation Committee was not my best decision. The reason for this decision was that I could not contribute much to enrollment for other pathways since my main job duties are serving business customers and not individuals. I consulted with Tish Kelly, chair of the committee, on this subject, and she confirmed that committees were being reassigned to different staff members in the beginning of FY'19 and several people asked to step down. She also contacted Ms. Waters over the phone while I was in her office and asked her opinion. Mr. Waters agreed that it was totally up to team members what committee to serve on. I made a request on March 22, 2019 to re-join the committee. As far as I know, in the last two years there were two instances when I had to leave the committee meetings before adjournment due to other scheduled meetings with Toyota, our single largest customer.

I had to miss a committee meeting on 10/25/2017 due to work scheduling conflict. I had a monitoring visit with a company which is required by our state auditors. Otherwise, I do not recall missing or being late or leaving early from any departmental meetings or college/division meetings in the last two years. I note that other colleagues have to leave meetings due to prior commitments and I assume that they have had no consequences.

I do not understand the basis for this rating.

INNOVATION:

Explores and suggests new approaches and methods to achieve departmental goals and responsibilities.

SELECT RATING -3

This rating above indicates that I strive to achieve departmental goals by exploring new approaches; however, the evaluation below indicates that I do not demonstrate initiatives to solve problems. This appears to be inconsistent and needs clarification in that I am rated high and low for similar a similar set of skills and performance.

PROBLEM SOLVING:

Analyzes facts and data, using sound judgment, to arrive at effective solutions.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I work with different types of data on a regular basis. Data includes Proassessment (ICC internal work-force system) numbers for projects and different reports (monthly president reports, monthly and quarterly MEP reports).

Dr. Lowder used an example of me not using Proassessment to generate information about billing statements in the past. While Proassessment has the function to track billing, our accountability team members do not rely on Proassessment to perform this function. They track all billing in their excel spread sheets and present to the team when available. I do not always have an updated spread sheet from the team on a regular basis. Also, in the past, ICC provided services either at no cost or low cost to the companies we served. The bills/invoices did not have a cost breakdown. It is not always possible to go several years back in order to remember or determine the cost for our fees and training materials. However, from reviewing quotes and billing statements in the last two years, I discovered examples of where I included several quotes for the Dean to compare companies' fees in the past. So, when it was possible, I provided the information he wanted to see (See attached).

Here is the data report with numbers indicating information about billing statements (dollar amounts) and hours of training ICC billed for projects I managed in FY'19.

I have scheduled /coordinated 1,105.5 hours of ICC training/services, which is the base for collecting \$79,085.05 in billing for ICC training/services.

There are three main producers on the team: two project managers and Continuing Education Department. The data below represents numbers for two project managers only. Based on the billing loss/profit report for project managers, my productivity level is at 86 % of the total training hours for WD&T department. See the chart below for details.

Producers	People in Classes	Percentage
Total for Project Managers	693	100%
Tatiana	462	66%

Producers	Training Hours	Percentage
Total for Project Managers	1,272.50	100%
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Please refer to the Total number of Hours and People Report for FY'19 in the attachment.

The chart below represents FY'19 only for the workforce team.

Total Billing/Net information for FY'19	Total	\$ 103,133.05	100%
	Tatiana	\$ 79,085.05	76%

Please refer for details for the billing report for FY'19 in the attachment.

This data (spring 2018-fall 2019) indicates I am the highest producer on the team.

Here is data for FY'19 only:

Total Billing/Net information for FY'19	Total	\$ 103,133.05	100%
	Tatiana	\$ 79,085.05	76%

I do not understand the basis for this rating.

DEPENDABILITY/SELF-MANAGEMENT:

Consistently adheres to work schedule, set priorities and completes assignments in a timely fashion.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job. Dr. Lowder assigned to me the MEP director duties in the fall 2018. He trusted me with a very important duty that generates \$100k for the college annually. Five months after being assigned the extra responsibility, I am then evaluated the lowest rating for Dependability/Self-Management.

The only example Dr. Lowder uses is from November 2017 when I had to schedule training for Toyota. (See page 16-17).

Training for Toyota included 408 hours of instruction by ICC CTE instructors, workforce trainers, workforce adjunct trainers, and 200 hours of instruction provided by two vendors from out-of-state. The request for this training was made in May-June, 2017. I had scheduled all these classes and made arrangements with trainers and the company, based on their production schedule, and availability, and I was required to change the dates at least three times due to both the company and instructor delays. The company finally made a decision in October concerning dates. I contacted all the parties involved again and diligently worked on the schedule. I informed Dr. Lowder at that time that this was a very time-consuming project. When the schedule was finalized, I created a quote. The quote had to be made after the schedule in order to know how much ICC's portion of the cost was to be. For example, the schedule included June and July, which June 30th is the end of the program year, and July 1 is the beginning of the new year. As a project manager, I must provide state reimbursement for instructional time in order for ICC not to carry the cost. June-July is the time for ICC's project close out- it is the time when we cannot submit reimbursements. The time-line for this quote was also determined by the time all trainers and vendors would get back to me. I had to manage the schedule between 5 different trainers/vendors. Once it was confirmed, I immediately submitted the quote and sent it to the dean. My goal was to schedule all classes where there would be no overlap with conflict for state funding. This is the only example I am aware of requiring extended time due to extenuating circumstances. This event occurred over a year and a half ago. I did the best job I could to be 100% accurate with all workforce funding available to the college since the college took the financial responsibility to pay over \$35k to the vendors who provided training for Toyota. This was one of the most complicated projects ICC has conducted and I carried the responsibility to make everything work. I am still a project manager for Toyota, and I am still trusted to manage all training activities for this company.

My work duties require meeting deadlines for different projects, state reporting and MEP reporting on a monthly basis. I have never been informed I missed a deadline with the state for submitting project related information or MEP reports.

Below is a short overview of my extra duty for FY'19. This duty is in an addition to my fulltime project management work load. This duty takes extra time and requires a much more compressed scheduled.

My duties involve:

1. Monthly webinar meetings with the state MEP directors- presentation for all current and upcoming projects.
2. Quarterly interaction in salesforce -interactions represent activities with manufacturing companies, creating new companies in salesforce which all involved codes (NAICS codes, Dunn and Bradstreet numbers, company representative contact information, etc.)
3. Reporting billing statements in salesforce.
4. Quarterly surveys for manufacturing companies. This duty involves working with the ICC business office and collecting financial statements for workforce staff salaries, entering this information in a spreadsheet and providing to the MMA-MEP Director.
5. Writing success stories on quarterly basis.
6. Annual audits. This duty involves combining all financial expenses in one journal, providing justification for all data entries and expenses.

This is the additional duty I assumed in the fall of 2018. I am also a fulltime project manager (see my duties under first paragraph in this document), and manage two pathway programs: Construction and Entrepreneurship. This role requires a lot of attention and time management. Again, I am requesting to review my productivity level to judge my time-line for completing assignments. I have never missed a deadline with the state or MEP assignments. As far as I know, I have never missed an internal department deadline. The only reprimand I received from Mrs. Waters was when she requested information from students' passing certification modules and both the trainer and I reviewed the file and the trainer sent the file to Mrs. Waters. However, this is not what she was looking for. I spoke with Mrs. Waters about it and explained that both the trainer and I were not clear regarding the details of her request.

I strive to provide quality work completed in a timely manner.

I do not understand the basis of this rating.

Demonstrates initiative to solve problems when unsure, and seek others advice to move toward a solution.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

An example of me seeking confirmation and direction when unsure is the email I wrote that was used as an example for me not solving a problem. I wrote to the Dean and Director: "Just an FYI about our entrepreneurship class. What should we tell those who are interested in supporting the program?". If Dr. Lowder felt I was pushing him to make a rushed decision, I apologize. I was simply seeking clarification. Dr. Lowder mentioned that I contacted banks without his permission. I have an assigned customer list of companies, including banks, and have always been encouraged to visit them and tell them about ICC's services. When I launched a Pathway to Construction Program in August 2018, I contacted and visited local construction companies to get them interested in supporting the idea. I help contribute the success of our programs to gain support from the community. I have had companies in the past to volunteer to contribute financially to support participants throughout the year. I mirrored this process with communication to potential supporters of the Entrepreneurship program. I am confused as to why this time Dr. Lowder would require permission before doing the same job I have done for the college in the past. He mentioned in front of Tim Senter what a great idea this program was, however, he used this as an example of me not seeking advice from others. Dr. Lowder expressed his concerns regarding SACS accreditation since I proposed a challenge exam to successful completers of this program. All college challenge exams must be approved by college fulltime lead instructors (subject matter experts). I explained this to Dr. Lowder. The challenge exam allows for non-credit students to receive college credit and help the college with enrolment. That is why ICC offers career pathways. Career pathways allow a transition for a student from no education or skill to an entry level job or a college credit.

I do not understand the basis for this rating.

TRAINING REQUIREMENTS:

Seeks out professional development opportunities and meets ICC professional development hours.

SELECT RATING -3

FINANCIAL/RESOURCE MANAGEMENT:

Manages financial performance in area of responsibility in accordance with budget and department goals.

SELECT RATING -2

My score is 2 which indicates that I demonstrate inconsistent aspects of performance requiring improvements to meet some goals.

Dr. Lowder used as an example that I do not provide enough information about past billing statements. It was the same example he used for Problem Solving (see above). I will re-state the following:

He had a misunderstanding that all billing statements are in our ICC internal Proassessment system. Also, in the past, all ICC services were provided either free or at a minimum charge. The goal was to serve business at the most affordable cost unless there was an expenditure for training materials, travel, etc. When Dr. Lowder assumed the role of director and dean, we made a decision to charge for the ICC services. Initially, bills did not have a detailed breakdown for the cost such as fees and ICC expenditures. It was not always possible to provide information about cost since all team members participated in the training or service and there was not an established way to provide tracking. Trainers ordered safety cards, data entry staff ordered books, and project managers wrote projects to pay the instructional portion of the class. The team made a big improvement this year by consolidating all this information into one tracking system. Please also refer to my responses above in which I have never had a fiscal finding, financial discrepancy, or request for additional information during my 16 years of being audited in this department.

I do not understand the basis of this rating.

Maintains accurate and detailed class records, certifications and budgets that will meet full audit compliance including: grants, state, and federal funds.

SELECT RATING -1

My score is a 1 which indicates that I do not meet goals and do not demonstrate skills for the job.

I have never had a fiscal finding during an audit in the last 15 years. During my time as a project manager, I witnessed three incidents when there were findings with other staff during the audits. The college faced the challenge to either pay the amount back or provide additional documentation. My performance record for workforce state audit accuracy is 100%. I am very proud of my record.

During Dr. Lowder's administration, the auditor pointed out some ways to improve the records for company sponsored training. This was not a finding in my records. In fact, this was the way ICC interpreted the policy for all company sponsored projects (including the ones I am not managing). Based on the FY17 audit, two project managers were asked to provide additional documentation due to the following findings:
Instructor signature was not included on the class roll. Per auditor, this is a strong violation and the reimbursement cannot be issued without instructor verification (this is a fiscal finding) —project number 2017-207-054. Additional documentation was required to justify travel reimbursement. Travel was not based on

the actual invoice and was authorized based on a quote- project number 2017-207-076. In the past 15 years, I have never been asked by the auditor to provide any additional information to support my files.

During the last audit for FY'17, all my files were in order. I did not rush and collect any documentation at the last minute for the projects that were selected. There was an incident with Project Manager 2, who had to prepare memorandum of agreements for three projects since the agreements were not on file and were not signed by companies. These agreements are used to validate the existence of companies and are crucial for the college to claim state reimbursement. It is a serious violation.

This rating is patently wrong and causes me serious concerns about the underlying motive for this entire evaluation.

PART TWO: SUMMARY REVIEW OF EMPLOYEE PERFORMANCE

Supervisor describes employee's major assignments and accomplishments, key strengths, any performance shortfalls, and other performance elements that characterize the employee's performance during the review period. Please include supporting information below.

Ms. Sherman has introduced some innovative programs to the division this past year including the 64 hr NCCER construction class and the ESB certification for Entrepreneurship. Ms. Sherman also agreed recently to coordinate the Manufacturing Extension Partnership, a federal grant matching program for the department. We will need to review this workload moving forward. The project management portion of the job is the focus of the position. The amount of companies serviced by the workforce department requires much attention. The team and I have experienced issues with communication, teamwork, tracking and proper documentation from Ms. Sherman over the past year and beyond. I will provide a detailed performance expectations plan to address these issues attached with this performance evaluation. The overall goal will be to outline strategies to move from a reactive to a proactive approach to project management, improve communication and teamwork within the department.

I have stated above the objective metrics for all areas of the evaluation. I want this to be a fair and honest judgment of my skills, knowledge and performance.

Quotes-

I am attaching quotes for at least a 6- month period with emails to go with quotes. All quotes were sent to the dean and director for approval. Dr. Lowder uses two quotes as examples of me not being on task.

I am also attaching a quote where I listed outlines for the class. Per Ms. Waters, Director, all outlines must be provided by instructors. Per Mrs. Waters, Project Managers must include outlines based on ICC workforce internal documents stored on shared X Drive (Workforce Class Information). When outlines are not included in the booklet, project managers must communicate with trainers and obtain the outlines. I referred this to the trainers and requested for them to provide the outline in the quote.

Dr. Lowder also used a quote for Toyota I issued in November 2017 as an example of me taking too long to submit. I explained this particular training above.

Training for Toyota included 408 hours of instruction by ICC CTE instructors, workforce trainers, work-force adjunct trainers, and 200 hours of instruction provided by two vendors from out-of-state. The request for this training was made in May-June, 2017. I had scheduled all these classes and made arrangements with both the trainers and the company, based on their production schedule. Due to multiple trainer/vendor/company time revisions, I was required to change the dates at least three times. The company made a final decision in October. I contacted all the parties involved again and diligently worked on the schedule. I informed Dr. Lowder at that time that this was a very time-consuming project. When the schedule was finalized, I created a quote. The quote had to be made after the schedule in order to know how much ICC's portion of the cost was to be. For example, the schedule included June and July, which June 30th is the end of the program year, and July 1 is the beginning of the new year. As a project manager, I must provide state reimbursement for instructional time in order for ICC to not carry the cost. June-July is the time for ICC's project close out- it is the time when we cannot submit reimbursements. The time line for this quote was also determined by the time all trainers and vendors would get back for confirmations. I had to manage the schedule between 5 trainers/vendors. Once it was confirmed, I immediately submitted the quote to the dean. My goal was to schedule all classes where there would be no overlap with a conflict for state funding.

Dr. Lowder was disappointed that I gave him the quote on Friday, the week before Thanksgiving. That was the constraint I was given to work with after a considerable period of working with all parties involved and the company.

This whole process was contingent on getting commitments from everyone involved. My goal was to work the best options for the company and the college.

2. Tracking/Documentation-

Dr. Lowder is referring to Proassessment as a reliable source to track billing statements. Our accountability staff has not used Proassessment in the past years to track billing. Our data entry staff member just started entering billing information in Proassessment in 2019. In the past, the data entry staff member used her own excel spread sheet to track what we billed as a department. Also, in the past, ICC did not bill for our training services unless it was consulting or we had to charge for training materials, certifications, etc. The cost and charges were not broken down on those billing statements. If classes were scheduled years back, I do not always remember the breakdown of the fee. Please provide a detailed example of a quote where this information was requested from me and I subsequently was not provide a record to answer the question. If given a specific example, I can provide a detailed explanation.

2b. Tracking of surveys/documents for class completion should be kept of file.

Dr. Lowder uses as an example where I submitted surveys for an Entrepreneurship class to the accountability specialist. Accountability staff keep all master files. They keep all originals so they remain in one place for the audit. I went back to the accountability specialist to retrieve the surveys, and he offered for me to look at the stack of all surveys -they were located in his window shelf. I went through them myself (there were surveys from different companies). Our accountability staff usually puts all documentation in separate files for each project at the end of the year. The surveys I was looking for were not in that stack. I have contacted students and collected three out of six surveys at this time. My goal is to collect all surveys by the end of the program year. The program year is July 1, 2019- June 30, 2019. Project managers have until the end of academic year on June 30th, 2019 to collect required documentation.

I am not aware of any other example of me not having required documentation on file.

2c. Project timeline tracking/checks

All workforce projects have a time line that is stated in the Memorandum of Agreement between the college and the company. This agreement says that ICC will issue a reimbursement check within 60 days from the day the documentation was submitted. In the last 2-3 years, ICC has not been able to meet this standard. My goal is to provide company service to the best of my ability. I submit the proper paperwork and there is staff whose responsibility it is to continue the process to payment. I only informed the dean and director when reimbursements were more than 90 days delayed. The goal is for us to monitor companies that have been delayed longer than others. My responsibility is to provide all the required documentation for the process to proceed. Delays for payments are beyond my control.

Attached are all quotes I created for the last 6 months along with emails showing that I verified all information with the dean and director.

3. Communication-

I do prefer to email information. I include all team members in communication when needed. I want all of us to have a good understanding and record for tracking purposes.

Dr. Lowder uses an example of me asking for companies' reimbursements for workforce payments. I asked the accountability staff first about giving me an update. They do not report to me. I only involve the dean and director when I feel that they need to know about the delay. I can inform the Dean sooner, if unstructured to do so.

3b. Process Communication-

Dr. Lowder repeats the same example about the quote for Toyota. Please refer to my previous explanation regarding the sequence of getting all parties coordinated and committed to that training series.

My goal was to work the best situation for the company and the college. Given all of the contingencies and parties involved, the process evolved based on the constraints presented.

3c. Company feedback-

Until the day of this negative evaluation, I have never been informed by anyone of any miscommunication or issue from a customer. Even now, I still do not know what happened and how I can correct it in the future. Customer service is my priority. I cannot improve if I do not know what actually happened. I asked Dean Lowder in front of Mr. Senter to explain to me what happened, but he refused to provide information.

4. Teamwork-

Dr. Lowder sets forth in my evaluation that I am not personally and physically involved in the process. I do not have an example from him. I know that I came during Christmas break and assisted with keying around \$32,000 in reimbursement for one of the companies. I want to explain that I entered all information from participants including creating classes in Proassessment; all classes were in Proassessment and all participants were entered and assigned to all classes. I worked very hard to help my team. At that time, the college had only reimbursed close to \$50-60 thousand to this company since July 1, 2018. I was very pleased to have helped process almost half of this amount and assisted the team in catching up. Note: I have never had to ask for help in project writing and management; however, I do help others with their part of the process to help get reimbursements to our companies.

4a-Teamwork-

Dr. Lowder told me about the pathway committee, after I launched the Pathway to Construction program. At that time, the team had two project managers (one is no longer with the college). She told me that there was a meeting downstairs and none of us was included. She was very upset about it. I gladly joined the committee once Dr. Lowder included me. The committee previously met twice a month. I participated every time, but, as explained above, I had to leave before the meeting ended on two occasions (approximately a year and half ago) when the meeting lasted longer than scheduled and I had prior company appointments to attend. The committee meets at 2.30 p.m. and I had previous engagements with two companies at 3.15 p.m. I excused myself and left a little early. Dr. Lowder told me in person that the team thinks I do not want to be there and that is why I leave early. This is a false assumption. In fact, many team members miss these meetings due to work conflicts or get to the meeting late or leave early. I was very concerned why anyone would think I did not want to be there.

Having only two instances over a two-year period of having to leave a meeting early is not indicative of a lack of team work.

4b. Collaborative example-

Dr. Lowder stated in the meeting that he tried "to protect "me by forcing me to participate as a volunteer and raise money for the blue grass concert in 2017. I proudly served as a volunteer for 10 years. Every employee was asked to participate and serve. Several employees chose to participate but, most did not. I chose not to participate only one year out of a decade. I suggested to Dr. Lowder that other team members should participate in this voluntary fundraiser and build up the goodwill the same as me.

This seems to be a moot point, since the college no longer hosts the bluegrass fundraiser.

4c. Process/paperwork example-

Dr. Lowder uses an example of when ICC scheduled a company visit with one of my workforce project customers. The ICC President and the dean planned to make this visit together. These types of visits have been on a monthly basis where Project Manager 2 was included 100 % of the time. I communicated with Dr. Lowder about me being purposely excluded on such visits and expressed my concerns as to why I am not included, considering that I am a project manager who is responsible for building relationships with customers, also. He did include me on a visit to a company in December 2018. However, after I had made the commitment, he told me at the last minute not to go. Our data specialist, whose job is to enter all training information into the internal data system, was asked to process a stack of paperwork for a company that day. Per our internal work processes, I verify all information after it is keyed. Two people cannot key the same information at the same time, however, after we got in the car on the way to the company, Dr. Lowder was frustrated with me and told me it was wrong for me not to stay in the office and "get my hands dirty". The company visit lasted an hour and I returned to the office. However, it was the next morning when I finished verifying all financial documentation and discovered an error of approximately \$800. I informed the director and dean that we cannot process this payment for training until the error is corrected. Per Dean Lowder, it took me too long to discover the discrepancy and I made a big mistake by going on a company visit. He told me I should have stayed in the office and discovered the error faster. This was a subjective judgement based on a false premise.

I have communicated with the director and dean multiple times about project managers being included in communication. Mrs. Waters apologized to me for excluding me on an on-going project with company #3. However, the trend still continues. On March 18th, I was contacted by a company that I serve as a project

manager that was visiting ICC the next day and having a meeting with Mrs. Waters. I emailed Mrs. Waters and asked about attending this meeting with her since the company representative asked me to be present. My concern is that this negative atmosphere is being created around me to make me feel uncomfortable by excluding me from normal communication. Teamwork is a two-way responsibility.

5. Feedback/Trust-

Dr. Lowder uses as an example of me not being professional and opening Ms. Waters' personal file. I want to clarify that all project managers use WESS, which is a state sub-grant system. All files in WESS are open to all users. DECS staff uses this system to open files and retrieve information they need about projects and services. Also, my workforce project for Ashley Furniture was used as an example for the entire workforce team in the state for training purposes. It is viewed by the community college state committee as an example of how to run and track the system. All projects in the WESS system are open source and not private. They are available for internal and external review.

Dr. Lowder uses as an example of a new project involving MDA funding and his disappointment that I contacted an external fiscal agent to seek clarification. He reprimanded me by stating "you are not allowed to contact college partners". I have never been aware of this violation. I wrote on January 8, 2019:

"TZ,

Additional support for William Sonoma project is good news. I will need more information about this 50-k grant and metrics /perimeters of the funding in order to begin developing a training plan.

I will be glad to contact Gary Golden directly if necessary. Thanks,

Tatiana"

I was never informed that I was not allowed to make that contact. There has never been a meeting or any discussion prior to this reprimand that workforce project managers are not allowed to contact external partners or companies for clarification.

My professional reputation is very important to me. I am and have been a team player and my work product speak for itself. I believe in building trust and strong working relationships with peers and administrators. Trust and communication are a two-way responsibility. I ask for fair and factual reviews.

For the above stated reasons, I respectfully request that my performance evaluation be reconsidered based on the additional information I have provided, and that I be given further explanation to assist me in meeting expectations moving forward.

Tatiana Sherman

Tatiana Sherman Date: *April 5, 2019*